MY LIFE IN THE HIGHLANDS AND ISLANDS RESEARCH

OCTOBER 2022

Highlands and Islands Enterprise
Iomairt na Gàidhealtachd 's nan Eilean

EVERYDAY CHALLENGES

44% say it would be difficult to have a takeaway delivered

28% say it would be difficult to take money out from a cash machine

21% say it would be difficult to stream a TV programme or film without pauses or buffering

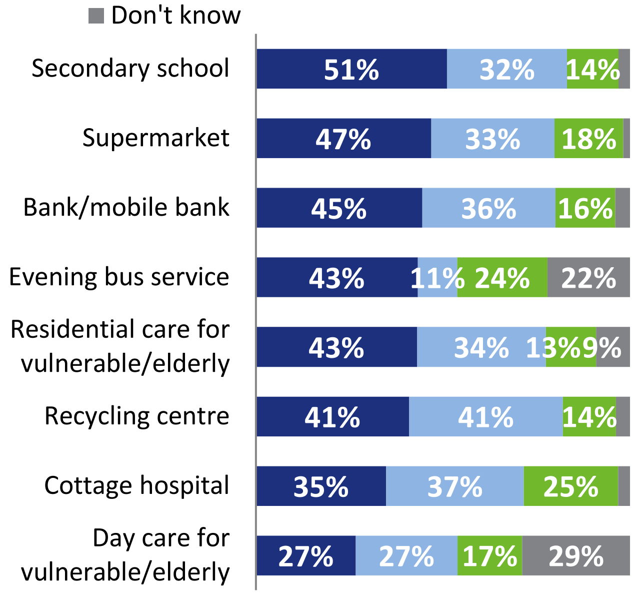
Those in remote rural locations are more likely to say each of these tasks would be difficult.

KEY SERVICES AND FACILITIES

Access to primary schools (77%), day time bus services (77%), convenience stores (74%), function halls (70%) and post offices (68%) is generally good within a 20-minute walking distance and most can access within a 20-minute drive.

For other key services, more need to revert to a 20-minute drive time, or are unable to access within this distance

- Within a 20-minute walk
- Within a 20-minute drive
- Not available within a 20-minute drive
- Don't know

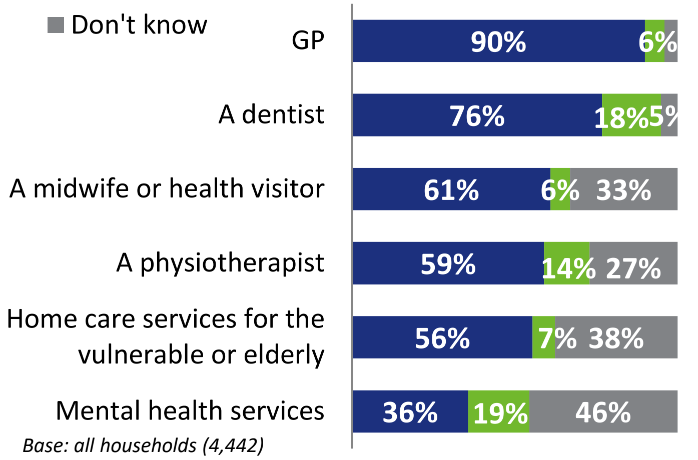


Base: all households (4,442)

Households in remote rural areas are less likely to have services available locally: e.g. 37% do not have a supermarket within a 20-minute drive and 29% do not have a bank or mobile bank.

HEALTH SERVICES

- Permanent/visiting service located within a 20-minute drive of local area
- Cannot be accessed in person within a 20-minute drive of local area
- Don't know



Base: all households (4,442)

Excluding those who don't know:

34% of households cannot access mental health services within a 20-minute drive

20% cannot access a physiotherapist within a 20-minute drive

19% cannot access a dentist within a 20-minute drive

Households in remote rural areas are less likely to be able to access these services within a 20-minute drive of their local area.

TRANSPORT

87% own at least one car

44% own two or more cars, rising to 56% in accessible rural and 51% in remote rural areas

87% rely on a car or van to get around (79% to a large extent), rising to 92% in accessible or remote rural areas.

68% of islanders rely on ferry services and 36% rely on air services. Increased numbers of tourists are felt to have made it more difficult for local people to access these services.

NOTES: The survey was conducted from 28th January to 25th March 2022, using a 'push-to-web' methodology. In total 5,301 adults from 4,442 households took part. Findings are weighted to ensure a representative sample of the region. Where percentages do not sum to 100%, this may be due to rounding, the exclusion of 'don't know' categories, or multiple answers.

HOUSING

90% Meets needs very/fairly well

8% Meets needs not very well/not at all well

Housing situation:

Expensive to heat	50%
Difficult to heat	17%

Base: all households (4,442)

Households in island and remote rural locations are more likely to say their home is expensive to heat and difficult to heat.

76% agree there aren't enough houses that can be rented at a reasonable price in their local area

75% agree there is a shortage of housing for local people in their local area

74% agree the right types of housing aren't available for local people to rent or buy, and that local people can't afford to buy housing in their local area

More likely to perceive local housing challenges: young people, households with children, those living in island and remote rural locations.
Newer residents (lived in region for up to a year) are less likely to know about housing challenges.

EMPLOYMENT AND ENTREPRENEURSHIP

42% employed in public sector

19% self-employed

People living on islands (24%) and in remote rural locations (26%) are more likely to be self-employed.

13% have more than one job, rising to 17% in remote rural areas

46% say they prefer to have more than one job

51% say they need to have more than one job
Those with a household income less than £26,000 are more likely to say this (79%)

Work views (top 4):

I am happy in my current job	65%
I am paid at least £9.90 per hour (the Real Living Wage)	49%
I am paid a fair wage for the work I do	46%
I have opportunities to develop my skills	41%

Base: all residents in work, aged 16+ (2,420)

12% want to start a business and become self-employed

46% say new businesses are starting up in their local area

29% say people are moving to their local area for new job opportunities

TRAINING

52% have undertaken courses or training in the past five years for work or their own interest

30% would find it difficult to access a course or work-related training in person from where they live

9% would find it difficult to access a course or work-related training online from where they live

Less likely to have undertaken courses or training: those with annual household earnings of less than £15,599 (63% have not) and between £15,600 and £25,999 (50% have not).

More likely to find it difficult to attend training in person: people living in remote rural areas (46%) and people living on islands (41%).

Barriers to accessing training (top 4):

Would require me to spend time away from home	32%
Broadband connection not reliable enough	25%
Broadband speed not fast enough	23%
Cost not affordable	23%

Base: all who think it would be difficult to access learning, aged 16+ (853)

ELECTRIC/HYBRID VEHICLES (EV)

7% have purchased or leased an electric/hybrid car

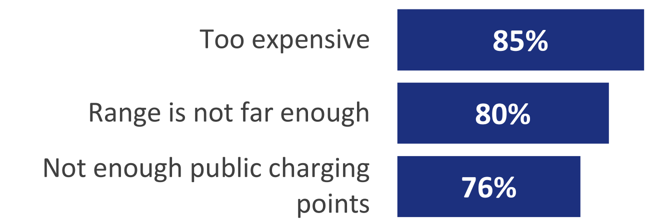
6% are planning to do so in the next 2 to 3 years

26% have considered and discounted an EV and 24% are yet to decide

Households with the highest incomes (£52k+) are more likely to have purchased/leased an EV (15%).

Barriers to EV ownership (top 3):

(% very/fairly convincing)



Base: all who have at least thought about purchasing/leasing an EV/hybrid aged 16+ (2,520)

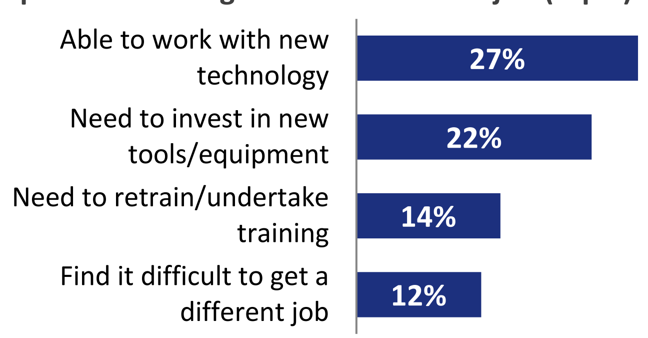
57% say it would be difficult to charge an electric vehicle on-street or at a car park in their local area

GREEN JOBS

22% say they would like a 'green' job that helps the environment or helps prevent climate change

42% of those in work expect their job will not be affected by the need to reduce carbon emissions. 19% say it would be difficult to adapt to changes.

Impact of reducing emissions on their job (top 4):



Base: All whose job would need to adapt to reduce carbon emissions (1,080)

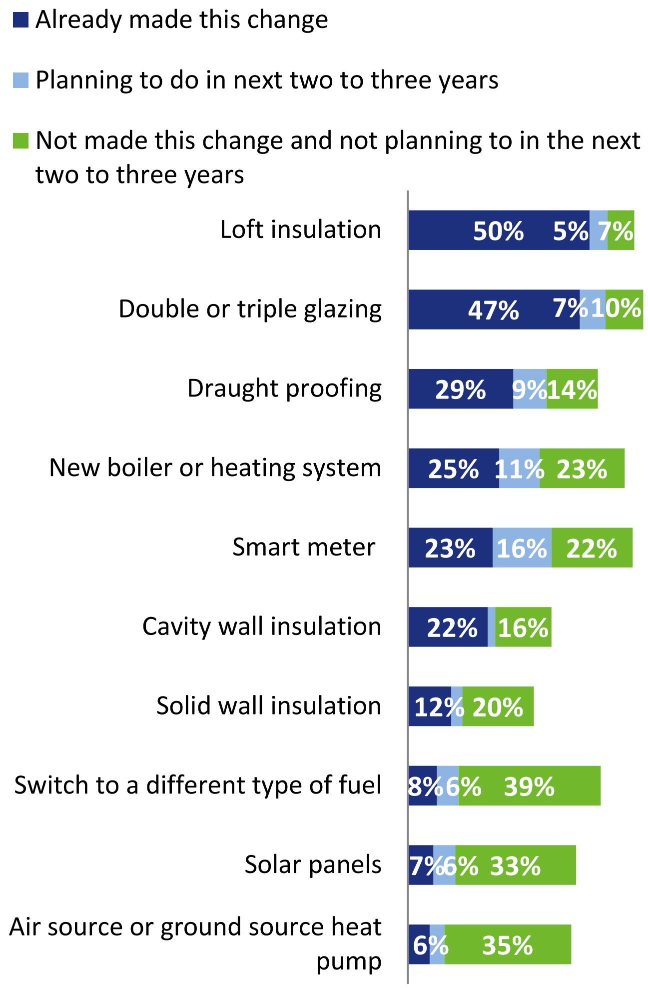
More likely to say they would need to invest in new tools/equipment: self-employed, private sector, environment/agriculture sector.
More likely to need to retrain: energy/utilities sector, lowest incomes.

ENERGY EFFICIENCY

The most commonly used energy sources are: electricity (37%), mains gas (33%) and oil (28%).

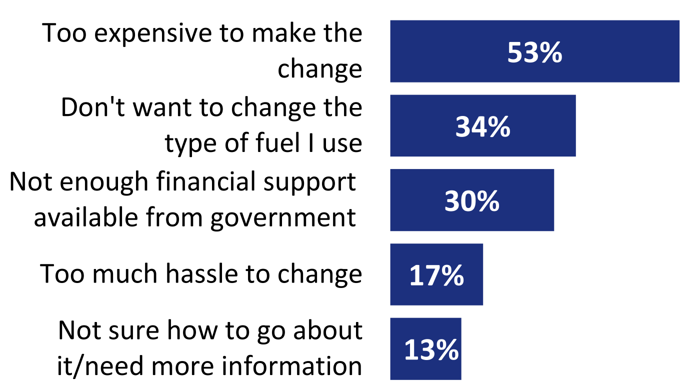
13% use green technology to heat their home*. The most used are air source heat pumps (7%) and solar panels (5%).

36% are planning to make energy efficiency improvements in the next two to three years:



Base: all households (4,442). Excludes 'Not our decision – renting the property', 'Not applicable' and 'Don't know' responses.

Reasons for <u>not</u> switching fuel type (top 5):



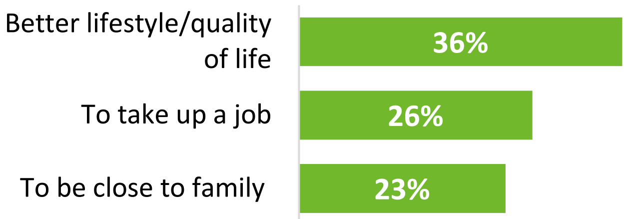
Base: all households not planning to switch fuel type (1,929)

NOTES: *Green technology refers to air/ground source heat pumps, solar panels and wind generators.

POPULATION CHANGE

37% of residents have always lived in the Highlands and Islands while 63% have not.

Reasons for moving to the region (top 3):



Base: all residents who have not always lived in the region, aged 16+ (3,449)

Those living in urban areas and working in the public sector were more likely to say they had moved to take up a job.

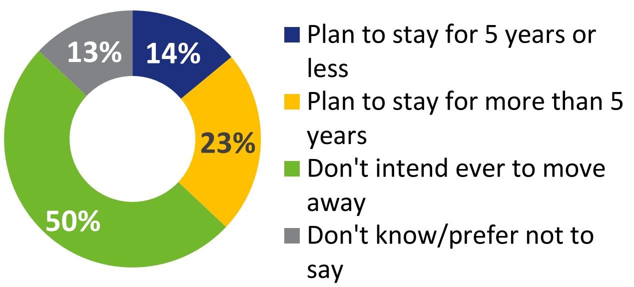
Residents' perceptions of recent migration:

56% say most of the people who move to their local area are retired

47% feel that people are leaving because they can't find work

45% think people have been moving to their local area because they can work from home

47% of young people aged 16-29 say they plan to stay in their local area for five years or less, compared to 14% of residents overall.

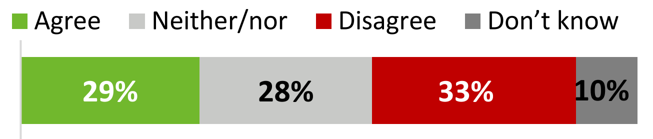


COMMUNITY

88% take a great deal/a fair amount of pride in living in their local area

Pride is especially high among those living in island (94%) and remote rural areas (92%).

Views are mixed on whether local people can influence decisions about their local area.



Base: all residents, aged 16+ (5,301)

Over half of residents (55%) take part in activities in their local community:

Base: all residents, aged 16+ (5,301)

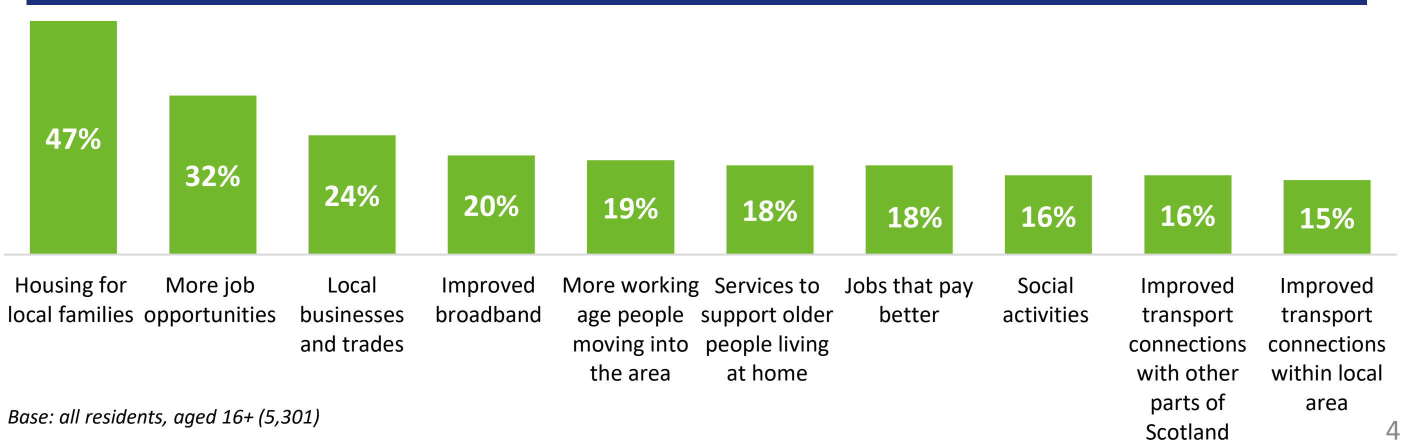
Those in island and remote rural locations and those aged over 30 are more likely to attend community events, volunteer or be a board member.

52% feel optimistic about their community just 16% are pessimistic

FUTURE ASPIRATIONS

Priorities for communities to thrive in the future (top 10):

Job opportunities, jobs that pay better and social activities are higher priority in towns. Housing, broadband, more working age people moving to the area and transport connections are more important in rural areas.



Base: all residents, aged 16+ (5,301)